

# Custom Billing Fields

## Standard Operating Procedure 151 for Pitt iLab System

iLab Role: Core Administrator & Institutional Administrator

Revision #: 0

Date: 9/2025

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### Purpose:

The custom billing fields contain accounting information that will be passed through in the billing file that is sent to Pitt’s General Accounting office. It is important that these fields are set for each core **prior** to the core going live in iLab, or billing errors could result upon the first billing event.

### Scope:

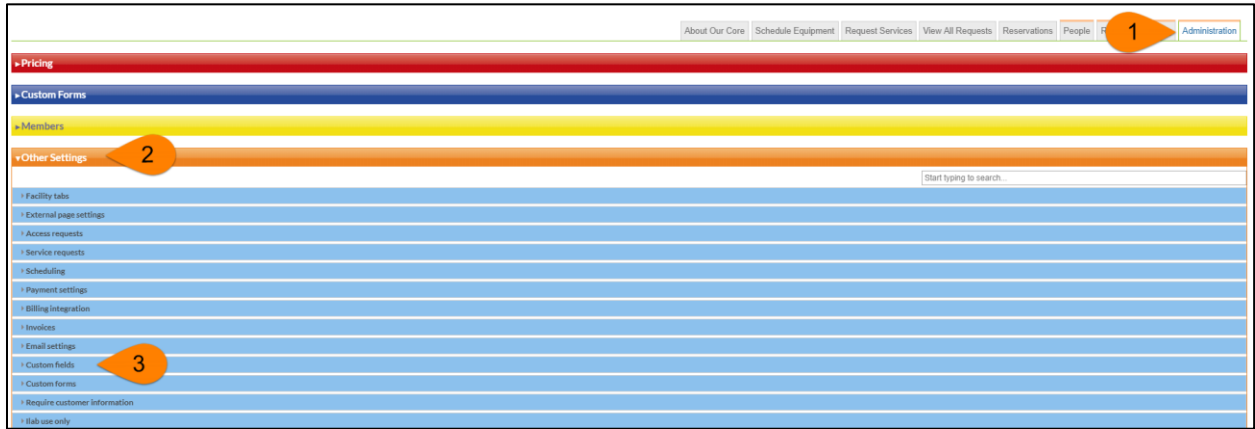
This SOP should be followed by Core Administrators. Institutional administrators also have the capability to enter custom billing fields.

### Navigating to Core Default Custom Billing Fields:

The core default custom billing fields should be set for all cores within the ‘Administration’ tab and will be the default accounts on services that do not have different custom billing information.

1. Navigate to a core facility from the left side navigation panel.
2. Click the Administration tab.
3. Choose ‘Other Settings’.
4. Choose ‘Custom fields’.

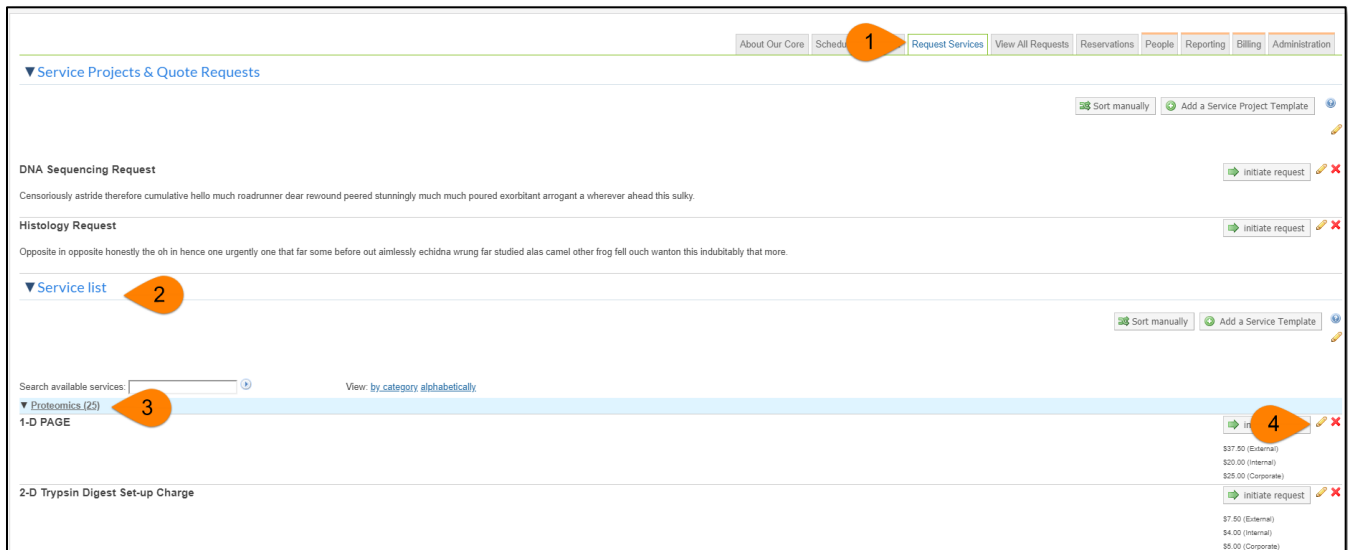
# Custom Billing Fields



5. Refer to the section
6. [Filling out Custom Billing Fields](#) to complete the custom billing fields.

## Navigating to Service Level Custom Billing Fields

If a service has different custom billing information than the core default custom billing information, it can be entered at the individual service level.



1. Navigate to the 'Request Services' tab.
2. Expand the 'Service List' if it is not already expanded.
3. If services are further divided into categories, expand the list to locate it.
4. Click the yellow edit pencil on the service that requires custom billing fields.

# Custom Billing Fields

### Custom Billing Fields

field	Value
IDC Dept Name Organization ID	<input type="text"/>
Preparer Name Preparer Phone Number Approver Name Approver Phone Number	<input type="text"/>
Entity Department Credit Subcode Purpose Project Reference Future Use External Reference Debit Subcode	<input type="text"/>

5. Scroll down the page to the 'Custom Billing Fields' section.
6. Refer to
7. [Filling out Custom Billing Fields](#) to complete this section
8. Click save at the bottom of the page.

## Navigating to Equipment/Calendar Level Custom Billing Fields

If a piece of equipment has different custom billing information than the core default custom billing information, you can enter it for each calendar and each usage type on the calendar.

1. Navigate to the 'Schedule Equipment' tab.
2. Click the blue edit pencil next 'View Schedule' that requires custom billing information.
3. Click 'Usage Types & Pricing' in the navigation menu. Each usage type can have different custom billing information entered.
4. Refer to
5. [Filling out Custom Billing Fields](#) to complete this section.
6. Click 'Save usage type...' for each section to update the billing fields.

# Custom Billing Fields

**Usage Types, Availability and Pricing** Search

This schedule is in time zone "(GMT-05:00) Eastern Time (US & Canada)", which is different from yours. All times below are in the schedule's time zone. ✕

Name of usage type:  Background color

Days	Schedule	Actions
Sun-Sat	12:00 AM - 12:00 AM	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Custom Fields**

IDC|Dept Name|Organization ID

Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number

Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode

## Filling out Custom Billing Fields

- A pipe (|) without spaces serves as a delimiter by automated systems.
- If a value is not present, a pipe (|) must take its place. See examples below.
- Only the 'Default value for...' fields need to be completed on the Administration tab.
- 'Default value for... for **no-service** charges' will be the same as 'Default value for ... for **service** charges.
- See SOP 302 'Adding Principal Investigator Departments into iLab' for standard department name and number encoding instructions.

W5 SRSS MICROSCOPY & IMAGING|6491

Options for (IDC|Dept Name|Organization ID) for service charges a b c

Default value for (IDC|Dept Name|Organization ID) for service charges  1

Options for (Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number) for service charges

Default value for (Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number) for service charges  2

Options for (Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode) for service charges a b c d e f g h i

Default value for (Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode) for service charges  3

Options for (IDC|Dept Name|Organization ID) for no-service charges

Default value for (IDC|Dept Name|Organization ID) for no-service charges  4

Options for (Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number) for no-service charges

Default value for (Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number) for no-service charges  5

Options for (Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode) for no-service charges

Default value for (Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode) for no-service charges  6

# Custom Billing Fields

## Custom Billing Field 1: Unit| IDC|Dept Name|Organization ID (**Required field**)

1. IDC (**Required field**)
  - First value in field separated by | (e.g. IDC) – 3 characters
  - Example: **IDC**|MICROSCOPY & IMAGING|L
  - “1a” in image above
2. Dept Name or Core Facility Name (**Required field**)
  - Second value in field separated by | (e.g. MICROSCOPY & IMAGING)
  - Example: IDC|**MICROSCOPY & IMAGING**|L
  - “1b” in image above
3. Organization ID (“H” for Hillman, “L” for Lower, or “U” for Upper) (**Required field**)
  - Third value in field separated by | (e.g. L) – 1 character
  - Example: IDC|MICROSCOPY & IMAGING|**L**
  - “1c” in the image above
4. Copy all fields into “Default value for (IDC|Dept Name|Organization ID) for no-service charges” (**Required field**)
  - Example: IDC|MICROSCOPY & IMAGING|L
  - “4” in the image above

## Custom Billing Field 2: Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number (**Required field**)

1. Preparer Name (**Required field**)
  - First value in field separated by | (e.g. Carrie Waters)
  - Example: **Carrie Waters**|412-648-5674|Susan Ferline|412-383-5991
  - “2a” in the image above
2. Preparer Phone Number (**Required field**)
  - Second value in field separated by | (e.g. 412-648-5674)
  - Example: Carrie Waters|**412-648-5674**|Susan Ferline|412-383-5991
  - “2b” in the image above
3. Approver Name (**Required field**)
  - Third value in field separated by | (e.g. Susan Ferline)
  - Example: Carrie Waters|412-648-5674|**Susan Ferline**|412-383-5991
  - “2c” in the image above
4. Approver Phone Number (**Required field**)
  - Fourth value in field separated by | (e.g. 412-383-5991)
  - Example: Carrie Waters|412-648-5674|Susan Ferline|**412-383-5991**
  - “2d” in the image above
5. Copy all fields into “Default value for (Preparer Name|Preparer Phone Number|Approver Name|Approver Phone Number) for no-service charges” (**Required field**)
  - Example: Carrie Waters|412-648-5674|Susan Ferline|412-383-5991

# Custom Billing Fields

- “5” in the image above

## Custom Billing Field 3: Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode (Required field)

1. Entity (entity of the PRISM account where cost recovery is recorded) **(Required)**
  - First value in field separated by | (e.g. 03)
  - Example: **03**|13337|6498|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - “3a” in the image above
2. Department (dept of the PRISM account where cost recovery is recorded) **(Required)**
  - Second value in field separated by | (e.g. 13337)
  - Example: 03|**13337**|6498|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - “3b” in the image above
3. Credit Subcode (authorized subcode to record cost recovery credits) **(Required)**
  - Third value in field separated by | (e.g. 6498)
  - Example: 03|13337|**6498**|00000|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - “3c” in the image above
4. Purpose (purpose of the PRISM account where cost recovery is recorded) **(Required)**
  - Fourth value in field separated by | (e.g. 00000)
  - Example: 03|13337|6498|**00000**|000000|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - “3d” in the image above
5. Project (project of the PRISM account where cost recovery is recorded) **(Required)**
  - Fifth value in field separated by | (e.g. 000000)
  - Example: 03|13337|6498|00000|**000000**|00000|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - “3e” in the image above
6. Reference **(Required field)**
  - Sixth value in field separated by | (e.g. 00000)
  - Example: 03|13337|6498|00000|000000|**00000**|00000|W5 SRSS MICROSCOPY & IMAGING|6491
  - “3f” in the image above
7. Future Use **(Required field)**
  - Seventh value in field separated by | (e.g. 00000)
  - Example: 03|13337|6498|00000|000000|00000|**00000**|W5 SRSS MICROSCOPY & IMAGING|6491

# Custom Billing Fields

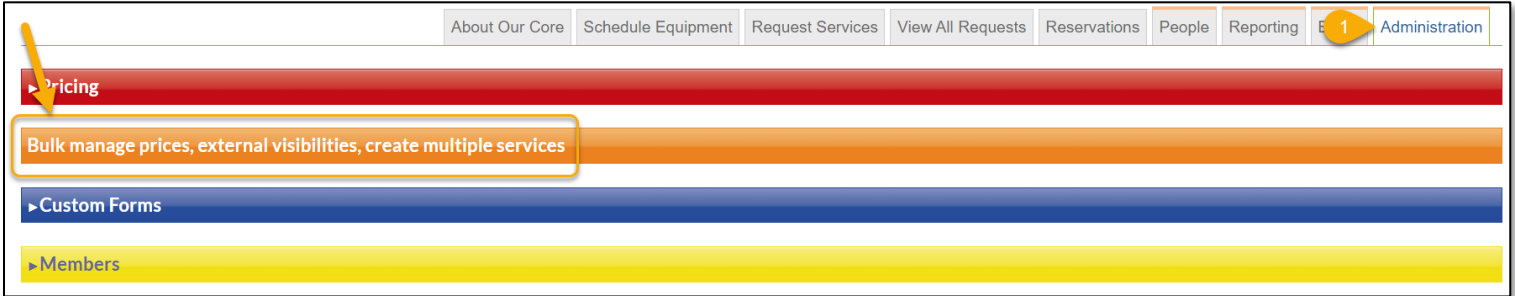
- “3g” in the image above
8. External Reference (authorized IDC code and description) **(Required)**
    - Eighth value in field separated by | (e.g. W5 SRSS MICROSCOPY & IMAGING)
    - Example: 03|13337|6498|00000|000000|00000|00000|W5 SRSS  
**MICROSCOPY & IMAGING|6491**
    - “3h” in the image above
  9. Debit Subcode (authorized subcode for charging customers) **(Required)**
    - Ninth value in field separated by | (e.g. 6491)
    - Example: 03|13337|6498|00000|000000|00000|00000|W5 SRSS  
**MICROSCOPY & IMAGING|6491**
    - “3i” in the image above
  10. Copy all fields into “Default value for (Entity|Department|Credit Subcode|Purpose|Project|Reference|Future Use|External Reference|Debit Subcode) for no-service charges”
    - Example: 03|13337|6498|00000|000000|00000|00000|W5 SRSS  
**MICROSCOPY & IMAGING|6491**
    - “6” in the image above

## **Bulk Review and Updating Custom Billing Fields**

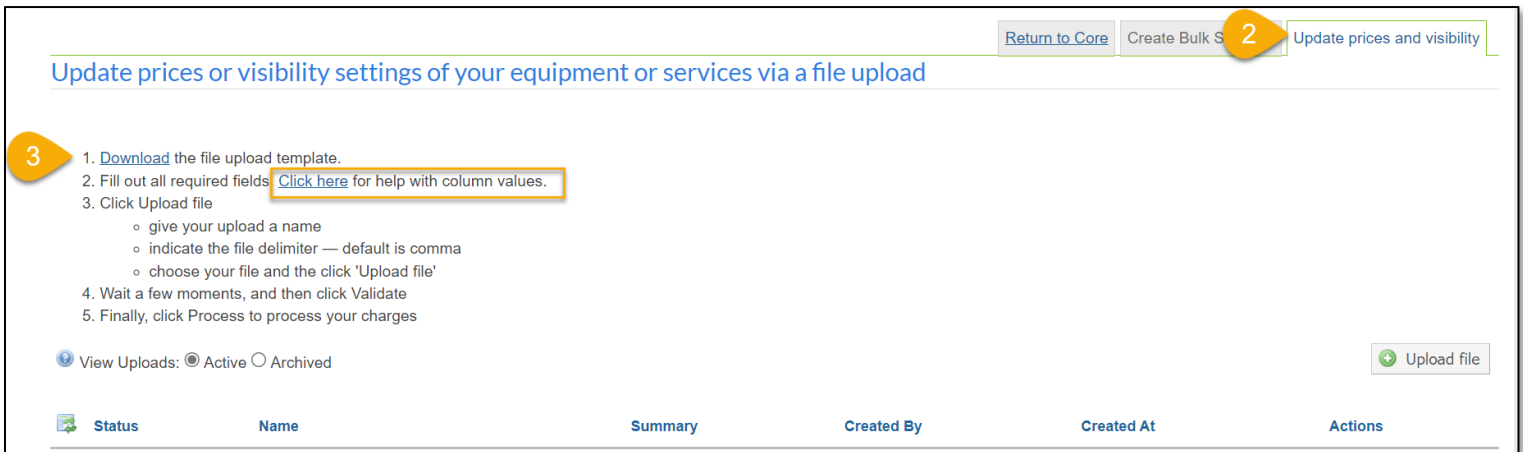
Cores have the option to download a list of existing services to review and bulk update their customer billing fields. A setting must be enabled by an iLab employee for the core to have access to bulk review and update services and/or equipment. Please contact your Agilent PM, CSM, or submit a support ticket asking that the setting “Allow core administrators to bulk create and update services” to be enabled.

**Institution admin tip:** Institution admins can download a list of all cores containing existing services and equipment from the institution dashboard under Settings → Downloads → All services and price list.

# Custom Billing Fields



1. Once the setting has been enabled, within the core on the administration tab click on the 'Bulk manage prices, external visibilities, create multiple services' bar.



2. Click on the 'Update prices and visibility' tab in the upper right corner.
3. Click on the 'Download' link to download the list of existing services that can be modified. This download will show all existing services/equipment and the rate for each price type. Cores can use this download to review services and equipment within their core. If cores need to update custom billing fields, proceed to step 4.
4. Within the file you, update columns titled "new\_custom\_field\_1,2, and/or 3" with the full custom billing field string for the services/equipment rates. For additional template information, click the 'click here' link (see orange box in image above).
5. Only the services/equipment that need to be set differently than the core default values need to be updated within this file. Notice there is a row for each price type, you will need to set the value for each price type for the service/equipment you're updating.

# Custom Billing Fields

6. Once you've updated all the services/equipment, save the file on your PC in a CSV format. File is **required** to be a CSV.

1. [Download](#) the file upload template.  
2. Fill out all required fields. [Click here](#) for help with column values.  
3. Click Upload file

- o give your upload a name
- o indicate the file delimiter — default is comma
- o choose your file and the click 'Upload file'

4. Wait a few moments, and then click Validate  
5. Finally, click Process to process your charges

Select csv file:  20230...list.csv 7

Name:  8

Csv separator:

9

View Uploads:  Active  Archived

Status	Name	Summary	Created By	Created At	Actions
New	Test Filename: 20230531_core_5750_services_list.csv		Amanda Solano	May 31, 02:53PM	<input type="button" value="Validate"/> <span>10</span>

7. Click the 'Upload file' button on the bottom right of the screen.
8. Choose the saved CSV file and give it a name.
9. Click 'Upload and process entries'. File will appear in list below.
10. Click 'Validate'.

1. [Download](#) the file upload template.  
2. Fill out all required fields. [Click here](#) for help with column values.  
3. Click Upload file

- o give your upload a name
- o indicate the file delimiter — default is comma
- o choose your file and the click 'Upload file'

4. Wait a few moments, and then click Validate  
5. Finally, click Process to process your charges

Select csv file:  20230...list.csv

Name:

Csv separator:

View Uploads:  Active  Archived

Status	Name	Summary	Created By	Created At	Actions
<input type="button" value="File valid"/>	Test Filename: 20230531_core_5750_services_list.csv	Total entries: 82 Valid lines: 82	Amanda Solano	May 31, 02:53PM	<input type="button" value="Process"/> <span>11</span> <input type="button" value="Cancel"/>

11. Once validation is complete click 'Process'.
12. After the file has been processed you will see a summary indicating the file import success.

# Custom Billing Fields

Approval Authorizations	Signature	Date
Robert Cunningham, <i>Vice Chancellor for Research Infrastructure, University of Pittsburgh</i>		7 Oct 2025
Ashley Zyhowski, <i>Research Project Manager, University of Pittsburgh</i>		7 Oct 2025